

**PROJECT OVERSIGHT REPORT**  
**Comprehensive Assessment Reporting Evaluation (CARE)**  
**Department of Social and Health Services**

**Report as of Date:**  
**June 2003**

**Project Director:** Daniel Knutson-Bradac  
**MOSTD Staff:** Tom Parma

**Executive Sponsor:** Penny Black

**Description:** The Comprehensive Assessment Reporting Evaluation (CARE) project will develop a new system to enable consistent, accurate, and efficient client assessments and plans for adult Medicaid clients in need of long-term care. The goals of the project are to: ensure correct eligibility determinations are made for corresponding benefits; establish a standard and consistent case management process that will ensure accurate assessments and client care plans; and, provide a formal assessment of risk indicators to reduce liability and protect vulnerable adults. CARE will replace an older Visual Basic and Access-based system developed by the Department of Social and Health Services' (DSHS) Aging and Adult Service Administration (AASA).

AASA has contracted with Deloitte Consulting for the development of the CARE system on a deliverables-based, fixed-price basis for \$2.965 million. Deloitte spent five years designing, developing, testing, and implementing a Comprehensive Assessment system for the State of Oregon. Since AASA's business requirements match those of Oregon, the development of CARE will be based upon a transfer of Oregon's design. AASA has contracted with Starling Consulting Inc., for external Quality Assurance.

The phases are:

- Phase I (AASA & Deloitte) – Project management plan, technical requirements, business requirements, preliminary design, and Phase II Project management plan.
- Phase II (AASA & Deloitte) – Final design, development, and testing.
- Phase III (AASA only) – System implementation.

**Technology:** Oregon's system was developed using PowerBuilder, a software technology new to AASA. Therefore, the decision was made to transfer Oregon's design and Deloitte's methodology and knowledge to AASA, but use JAVA and Microsoft SQL Server database technologies to develop the system. Both DSHS and Deloitte have extensive knowledge of these tools.

**Life Cycle Stage:** Phase III – System Implementation began April 1, 2003 and was scheduled to be complete by the end of December 2003.

**Budget:** The project is on budget. The five-year lifecycle cost for the project is \$6.7 million. Phases I and II were completed on time and on budget.

**Status:** Phases I and II completed on schedule and on budget. These were performed under a fixed price contract. AASA has accepted the system and is now in the implementation phase.

**Issues:** The following issue pertains to Phase III – System Implementation and Statewide Rollout, which is the sole responsibility of AASA:

- Project implementation: The contract with Deloitte Consulting ended March 31, 2003. AASA has sole responsibility for implementation, but limited experience rolling out a system of this magnitude and complexity. The original plan called for two regions to be implemented at a

time until all were operational. A contingency plan was developed for switching to a less aggressive, single-region implementation approach if AASA deemed it necessary. AASA has elected to implement this single-region approach. Although the system is stable and functioning, AASA is finding that the user community is taking longer to absorb the amount changes to both business rules and technology.

**Recommendation:** No recommendation. This continues to be a well-managed project.